Drawing Register – User Guide

Thank you for downloading Drawing Register.xls for Microsoft Excel 2002 & onwards (**www.alanwelsman.co.uk/Drawing Register.xls**)

I hope it helps you as much as it has helped me over the past few years, although much effort has already gone into the creation of Drawing Register, I am still happy to receive any comments or concerns you may have purely in relation to Drawing Register and it's functionality to **alanwelsman@alanwelsman.co.uk**.

There are no restrictions set to how you wish to use Drawing Register, my only comment would be not sell this freely available program as it remains the property of Alan Welsman at all times, Drawing Register **has** been registered for protection with the UK Copyright Service.

Donations: Drawing Register is 100% free, being free comes with an inbuilt counter, every 50 times used you will see a message as follows:

"If you feel as though my efforts of writing Drawing Register has achieved it's goal of helping you within your scope of works and at your discretion would like to contribute something as a token gesture towards keeping future versions of Drawing Register and it's hosting website alive, you can do so via a Paypal Donation, any contribution will be gratefully appreciated, you will be directed to my web site once this message box has disappeared, again thank you for using Drawing Register"

To escape the donation message, simply press the [**Escape**] button on your keyboard.

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Note 1: Where written **DR** in this document simply means **Drawing Register**.
Note 2: When you open **DR**, you will be asked to **enable/disable** macro's, please **enable** them.
Note 3: When you close **DR**, you will not be asked to save, **DR** automatically performs this task upon exiting to ensure all data is saved.
Note 4: When you select "**Save As**" **DR** will create a backup of it'self called "**Drawing Register - Backup.xls**".

What is Drawing Register and what is it's purpose?

Drawing Register is a tool to help provide very fast access to a specific range of documents stored on your own PC or on a remote server.
It's a unique Microsoft Excel file, created using MS Excel 2002 and Visual Basic ensuring it's compatibility with future revisions.

It's purpose is to help you control your documents efficiently and to help your colleagues locate and share those documents faster with much less effort and at the same time, save you and your business money by cutting the time wasted trying to locate those documents.

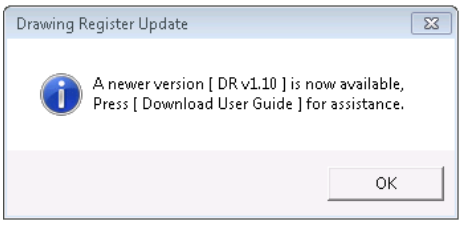
Based around electronic file tagging, **DR** allows you and your colleagues to search to clone, compare, delete, open, view, print and speedmail your superseded or latest working documents from your desktop directly to your audience even if your PC is connected remotely.

There is no need to purchase additional software as **DR** is already compatible with Microsoft Office and it's Excel package.

How to Upgrade

From time to time "**Drawing Register.xls**" will be revised to include new features or to correct minor bugs if found.
As soon as the improvements are made, the uploading of **DR** is instantaneous.

If you open **DR** and are alerted to an upgrade message like the one detailed below, please proceed to download the newer version.



< When you see a message similar to this one,
your **Prefs** and **Local** data is automatically backed up.
Stored into the backup file **FileList.xls** which sits locally on your PC and the file **FileList.xls** which sits on your server if you are setup as an administrator.

As your records are now backed up, just follow the sequence below to complete the upgrade process.

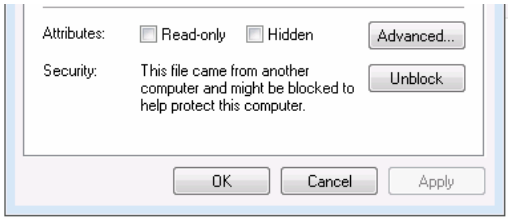
1. Before you close **DR**, navigate to **File** then press "**Save As**" - This will act as a safeguard just in case something goes wrong.
2. Close **DR** then download a new version of **DR** from: **www.alanwelsman.co.uk/Drawing Register.xls < press** then **"Save As"**
3. When asked where to save the new version of **DR**, save it into the same folder as the old **DR** file and allow to **overwrite** the old file.
4. Navigate to the overwritten **DR** file then **right** mouse click **DR**, select **Properties** then press the **Unblock** button then **Apply** then **OK**.
5. Open **DR, enable** macro's then select the worksheet tab **Local**, the contents of **FileList** / **Prefs** and **Local** are re-instated to **DR**.
6. All done, the upgrade is now completed, you will be asked for new passwords when closing **DR**.

Changelog

V1.11: ??-??-????	**TBC**
V1.10: 15-08-2015	**Add QS function**: Under group search, entering **??** will list the different group types.
V1.09: 17-05-2015	**Add QS function**: Choose specific records from a search report by touching it's row number. **Add function**: On file open, auto-check for revision changes and show the new version available. If a new version is available, auto-backup the current version of **DR** to the backup file **FileList**.
V1.08: 15-02-2015	**Add QS function**: Add the option to Speedmail, attach and add their filenames into an email body. **Add Speedmail function**: Auto import a speedmail.xls database into the **DR**/**Local** database if found.
V1.07: 15-11-2014	**Code upgrade**: Enable faster file searching across networked folders when connected via VPN.
V1.06: 15-08-2014	**Add QS function**: Add the **Quick Search Options** dialogue box to provide a better user interface.
V1.05: 15-05-2014	**Code upgrade**: Perform faster sorting of databases without having to unprotect worksheets.
V1.04: 15-02-2014	**Prefs**: Increase the number of search engines to 5 and add the ability to configure those search engines.
V1.03: 15-11-2013	**Add function**: List files within both path folders to produce live database reports of folder contents. **Add function**: Right mouse click a path folder filename to move that particular file between folders.
V1.02: 15-08-2013	**Add function**: If the backup file **FileList** does not exist, create it and auto-backup **DR**/**Prefs** & **Local**.
V1.01: 15-07-2013	**Add function**: When opening **DR**, apply worksheet protection and user environments. **Add function**: When closing **DR** for first 3 times, add the option to add or change your user passwords.
V1.00: 13-06-2013	Initial build in 2013 for personal use.

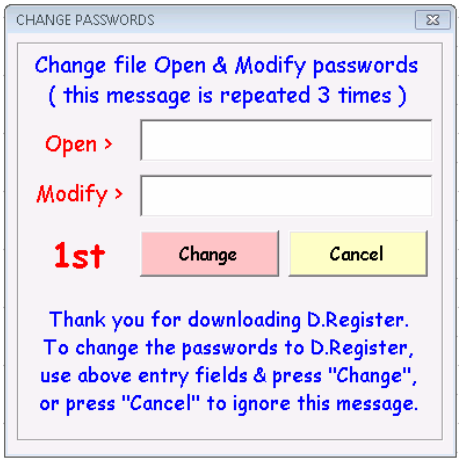
Notes

Each time you download "**Drawing Register.xls**", right mouse click the file then select "**Properties**" from the list of options.



< Press "**Unblock**", **Apply** then **OK** button's to make "**Drawing Register**" a trusted file. This will allow the hyperlink function "**File Open**" to work without the repeated security warning pop-up message advising you that you are about to open a file.

1. Please ensure you have installed the component **Visual Basic** prior to running **DR**, **DR** will not function correctly without it.
2. When you open **DR**, you will be asked to enable/disable macro's, please **enable** them.
3. Macro's within **DR** are safe, they are small automated programs which run in the background of **DR** when called upon.
4. If **DR** discovers the remote file "**FileList.xls**" is missing, **DR** will attempt to create one, if this happens, select "**Yes**".
5. When you close **DR** for the first 3 times, you will be asked on each occasion to create a "**Password**" of your choice.
6. On the "1st" attempt, create a password and write into both boxes - Note: You ***can*** see the password!
7. On the "2nd" attempt, if you wish to change the passwords, enter your new passwords, otherwise press "Cancel"
8. On the "3rd" attempt, if you wish to change the passwords, enter your new passwords, otherwise press "Cancel"
9. If the "2nd" and "3rd" attempt were left blank, the password will stay as the password entered on the "1st" attempt.
10. Each time **DR** opens, "**Quick Search**" will be the first screen you will see ready for searching your files.


CHANGE PASSWORDS
Change file Open & Modify passwords
(this message is repeated 3 times)
Open >
Modify >
1st
Change
Cancel
Thank you for downloading D.Register.
To change the passwords to D.Register,
use above entry fields & press "Change",
or press "Cancel" to ignore this message.

< When you close **DR** for the first 3 times, you will be presented with this form. Create new passwords to protect data within **DR**.

Problem Solving

If you try to use **DR** and find things are not working as they should do, try the following.

1. Close **DR** then Re-Open, when asked to enable/disable macro's, please **enable** them.
2. Change between any worksheet tabs, this will kick-start and reset automatic functions.
3. **Screen size does not automatically change**: Ensure when you open **DR**, you **enable** macro's.
4. **Excel does not appear to be calculating or changing values**: Ensure Excel **Tools / Options / Calculations** is set to "**Automatic**"

Hyperlink issues arose after uninstalling Google Chrome on a Windows based PC, many **DR** hyperlinks ceased to function, there is an issue where the registry file is not completely reset during the uninstallation process of Google Chrome, this can be fixed but recommend should be done by users experienced in the Microsoft Windows system registry file, the fix is to search for all values labelled as "**ChromeHTML**" or "**FireFoxHTML**" and rename them as "**htmlfile**".

If one on your columns refers to drawing scales, instead of writing **1:100** write **1 to 100** - Don't use the colon.
If some of your filenames consist of numbers only, try not to use filenames greater than 15 numbers in length, add text within their filename.
If at any time all automatic functions appear to stop working, carry out any of the 4 options above, if those options still fail to resolve the issue, close **DR** then re-open making sure to **enable** macro's.

When requesting to delete files, you can only delete files on your own PC unless you are setup as an administrator.
In either case, you will be asked 3 times to confirm the delete process, deleted files do **NOT** go to the recycle bin and deleted files can **NOT** be restored.

On Microsoft Windows based PC's running Office 2010 and later, you may experience repeated security warning messages each time you try to open hyperlinked files, this is an automated security response setup within the programming of Microsoft Office, earlier versions of Office do not show the messages, if you want to stop the messages, refer to the section **Notes** on **Page 3** above and the **unblocking** of **DR**.

System Requirements

DR has been written within the parameters of Microsoft Excel version 2002 (v10.0), 32 bit running on a Microsoft Windows based PC.
The current version of **DR** has been tested using Excel 2002 (v11.0), 2007 (v12.0), 2010 (v14.0) without any issues.
At the time of writing, **DR** has not been tested on Excel 2013 (v15.0).

Minimum requirement is to have a Windows based computer system running Excel 2002.

The Drawing Register.xls file is approx 2.0Mb (Mega bytes) in size.

Feedback

If you use **DR** and believe you have an idea which could be integrated into **DR** and it's future revisions, please feel free to email me your comments.

If you disagree with a comment or function I have written into **DR**, again feel free to comment: **alanwelsman@alanwelsman.co.uk**

Setup for local or network use (Local)

Local / Personal Use *(You do not need to be an administrator to carry out this process)*

General User Info	1	Please enter your site location name and email subject title your documents relate to >	> Your Site & Contract No Here <						
	2a-2f	Please enter 4 path folder header titles & 2 local new file found reference codes >	A	D	E	G	H	K	
	3a-3b	Please enter text to be displayed for "New" / "Open" files within path folders >		New >			Open >		
	4a-4b	Automatically update "Current" / "Superseded" folders when "DR" open's ? >		Yes			Yes		
	5a-5b	File extension of documents i.e; "pdf" / Remove ".tmp" files on "DR" close >		pdf			No		
	6a-6b	Allow "FileList" to auto update "DR" upon file open / local or networked >		No			Local		
	7	Give permission to export to remote "FileList" & delete physical files >							
C-Path >		C:\Users\Alan Welsman\Desktop\							
S-Path >		C:\Users\Alan Welsman\Desktop\Superseded\							
&		The default path below is where "Drawing Register" is currently located, the above path's are where your pdf files are.							
Default >		C:\Users\Alan Welsman\Desktop\							

1. Onto your PC, create a folder called **Drawings** and inside that folder, create another folder called **Superseded**.
2. Into the folder called **Drawings**, download the file **Drawing Register.xls** - **link**: **www.alanwelsman.co.uk/Drawing Register.xls**
3. Right click the downloaded file **Drawing Register.xls**, select **Properties**, then press **Unblock**, then **Apply** then **OK**.
4. Create a shortcut to the file **Drawing Register.xls** and if required place it onto your desktop.
5. Into the folder called **Drawings**, put all your active/current drawings or documents (ensure all are 1 type of file i.e **pdf**).
6. Into the folder called **Superseded**, put all your outdated/superseded drawings or documents (again 1 type of file i.e **pdf**).
7. Go to your desktop and click the shortcut for the file **Drawing Register**, ensure you **enable** macro's or content when asked.
8. When you open **DR**, it will create a backup file called **FileList.xls**, please allow it to do so.
9. Select the worksheet **Prefs**, right mouse click the red No.**1** to auto-setup defaults for **Q1** to **Q6b**.
10. Select the empty cell for **C-Path >** and right mouse click it, the default path will be entered for you.
11. Select the empty cell for **S-Path >** and right mouse click it, the default path will be entered for you.
12. Select the worksheet **Current** and press the **Update** button, press until the words **New >** or **Open >** appears, arrow left then up.
13. Select the worksheet **Superseded** and carry out the same as written in line **12**.
14. Select the worksheet **Local** and proceed to enter details against any new files found in the available empty spaces.
15. Select the worksheet **Quick Search** and enter a search string to display any matching records, select files to open them.
16. Select the worksheet **Prefs**, press the **HELP** button then press the button **Export to FileList >** to backup **DR/Local** database.

Setup for local or network use (Network) *(Network Server - Administrators to setup and manage this file)*

General User Info	1	Please enter your site location name and email subject title your documents relate to >	> Your Site & Contract No Here <						
	2a-2f	Please enter 4 path folder header titles & 2 local new file found reference codes >	A	D	E	G	H	K	
	3a-3b	Please enter text to be displayed for "New" / "Open" files within path folders >	New >			Open >			
	4a-4b	Automatically update "Current" / "Superseded" folders when "DR" open's ? >	Yes			Yes			
	5a-5b	File extension of documents i.e; "pdf" / Remove ".tmp" files on "DR" close >	pdf			No			
	6a-6b	Allow "FileList" to auto update "DR" upon file open / local or networked >	No			Network			
	7	Give permission to export to remote "FileList" & delete physical files >	123456 654321						
C-Path >		C:\Users\Alan Welsman\Desktop\							
S-Path >		C:\Users\Alan Welsman\Desktop\Superseded\							
&		The default path below is where "Drawing Register" is currently located, the above path's are where your pdf files are.							
Default >		C:\Users\Alan Welsman\Desktop\							

1. Onto your server, create a folder called **Drawings** and inside that folder, create another folder called **Superseded**.
2. Into the folder called **Drawings**, download the file **Drawing Register.xls** - **link**: **www.alanwelsman.co.uk/Drawing Register.xls**
3. Right click the downloaded file **Drawing Register.xls**, select **Properties**, then press **Unblock**, then **Apply** then **OK**.
4. Create a shortcut to the file **Drawing Register.xls** and place it onto your desktop.
5. Into the folder called **Drawings**, put all your active/current drawings or documents (ensure all are 1 type of file i.e **pdf**).
6. Into the folder called **Superseded**, put all your outdated/superseded drawings or documents (again 1 type of file i.e **pdf**).
7. Go to your desktop and click the shortcut for the file **Drawing Register**, ensure you **enable** macro's or content when asked.
8. When you open **DR**, it will create a backup file called **FileList.xls**, please allow it to do so.
9. Select the worksheet **Prefs**, right mouse click the red No.**1** to auto-setup defaults for **Q1** to **Q6b**.
10. Select box **7** and enter the word **admin** then right mouse click the word **FileList** in the question to have a code appear.
11. Select the empty cell for **C-Path >** and right mouse click it, the default path will be entered for you.
12. Select the empty cell for **S-Path >** and right mouse click it, the default path will be entered for you.
13. Select the worksheet **Current** and press the **Update** button, press until the words **New >** or **Open >** appears, arrow left then up.
14. Select the worksheet **Superseded** and carry out the same as written in line **13**.
15. Select the worksheet **Local** and proceed to enter details against any new files found in the available empty spaces.
16. Select the worksheet **Quick Search** and enter a search string to display any matching records, select files to open them.
17. Select the worksheet **Prefs**, press the **HELP** button then press the button **Export to FileList >** to backup **DR/Local** database.
18. Close **DR** and make sure you add a password to open and modify so only you can update and manage the **FileList** database.

Administrator - If you want to administer remotely, still carry out the process **1** to **18** above, then move the file **Drawing Register.xls** to your personal desktop and follow the additional steps **19** to **23**.

19. Open the moved file **DR** using your passwords and allow a new backup file **FileList.xls** to be created.
20. Select the worksheet **Prefs** then select cell **6b** and enter the text **Net** or **Network**.
21. Press the word **C-Path >** and navigate to the **drawings** folder setup on the server, press OK when done.
22. Press the word **S-Path >** and navigate to the **superseded** folder setup on the server, press OK when done.
23. Select the worksheet **Prefs**, press the **HELP** button then press the button **Export to FileList >** to backup **DR/Server** database.

Network *(Client work- stations - You do not need to be an administrator to carry out this process)*

General User Info	1	Please enter your site location name and email subject title your documents relate to >	> Your Site & Contract No Here <						
	2a-2f	Please enter 4 path folder header titles & 2 local new file found reference codes >	A	D	E	G	H	K	
	3a-3b	Please enter text to be displayed for "New" / "Open" files within path folders >	New >			Open >			
	4a-4b	Automatically update "Current" / "Superseded" folders when "DR" open's ? >	Yes			Yes			
	5a-5b	File extension of documents i.e; "pdf" / Remove ".tmp" files on "DR" close >	pdf			No			
	6a-6b	Allow "FileList" to auto update "DR" upon file open / local or networked >	Yes			Network			
	7	Give permission to export to remote "FileList" & delete physical files >							
C-Path >		Z:\Alan Welsman\Desktop\							
S-Path >		Z:\Alan Welsman\Desktop\Superseded\							
&		The default path below is where "Drawing Register" is currently located, the above path's are where your pdf files are.							
Default >		C:\Users\Alan Welsman\Desktop\							

1. Onto your PC, create a folder called **Drawings**.
2. Into the folder called **Drawings**, download the file **Drawing Register.xls** - **link**: **www.alanwelsman.co.uk/Drawing Register.xls**
3. Right click the downloaded file **Drawing Register.xls**, select **Properties**, then press **Unblock**, then **Apply** then **OK**.
4. Create a shortcut to the file **Drawing Register.xls** and if required place it onto your desktop.
5. Go to your desktop and click the shortcut for the file **Drawing Register**, ensure you **enable** macro's or content when asked.
6. When you open **DR**, it will create a backup file called **FileList.xls**, please allow it to do so.
7. Select the worksheet **Prefs**, right mouse click the red No.**1** to auto-setup defaults for **Q1** to **Q6b**.
8. Re-select cell **6a** and type **Yes** to enable the auto-importing of server database details.
9. Re-select cell **6b** and type **Net** or **Network** to tell **DR** it's database details is being imported from a networked source.
10. Press the word **C-Path >** and navigate to the **drawings** folder setup on the server by the administrator, press OK when done.
11. Select the empty cell for **S-Path >** and right mouse click it, the default path will be entered for you.
12. Select the worksheet **Quick Search** and enter a search string to display any matching records, select files to open them.

Please peruse the remainder of this document to see how to use specific worksheets.

HELP

This software remains the property of Alan Welsman (c) 2013
1. Create a folder called "Drawings" and inside that folder, create another folder called "Superseded".
2. Into the folder called "Drawings", put this file "Drawing Register.xls", create a shortcut if you need to.
3. Into the folder called "Drawings", put all your active/current drawings or documents.
4. Into the folder called "Superseded", put all your outdated/superseded drawings or documents.
5. Drawing Register is now ready for use, for personal use, a database file will be created called "FileList".
6. FileList if located on a networked drive should be the file kept up to date so all other Drawing Registers can update their databases from it, this way only one single database needs to be managed, you can stop Drawing Register importing data from the FileList by leaving blank the box 6a within the worksheet "Prefs".
Pressing "Save As" will automatically create a backup file called "Drawing Register - Backup.xls".
Pressing "Close" will automatically save all your work before the file is actually closed.
For more information visit
http://www.alanwelsman.co.uk/software.html
Use the buttons below to transfer database details from and to FileList
FileList: 0 records
< Import from FileList
Export to FileList >
Register: 0 records
This software remains the property of Alan Welsman at all times, I grant you free usage on the basis you remain prohibited from attacking, disassembling, altering, modifying, cracking, hacking or what ever you wish to call it, breaking open this file, why not donate to my site instead, it's cheaper.
Copyright Law UK - Explained
Download User Guide
Donate

Located on the worksheet "**Prefs**" is a button labelled "**HELP**", if pressed will display the dialogue box displayed above.
As well as displaying a guide on how to setup **Drawing Register**, the dialogue box has 6 other functions and are as follows:

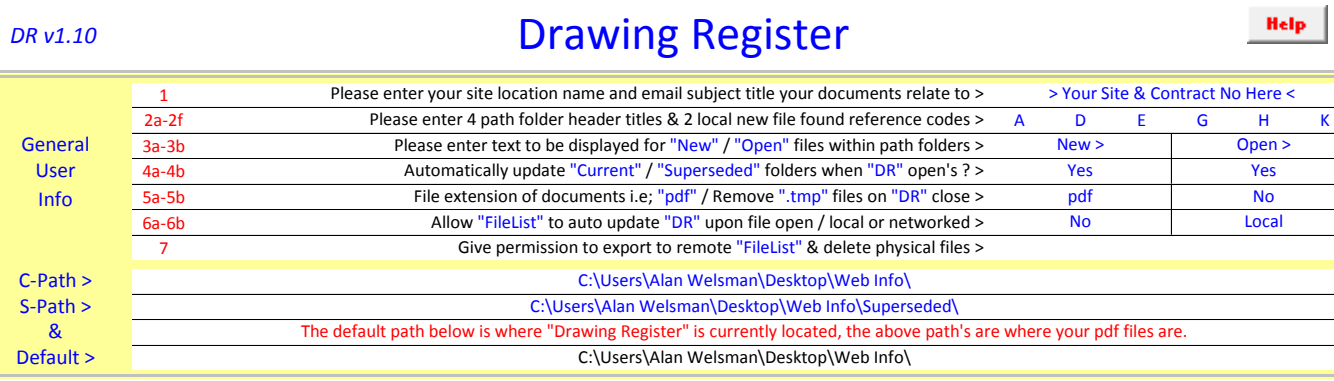
1. **http://www.alanwelsman.co.uk/software.html** is the hyperlink address where you can download "**Drawing Register.xls**" from.
2. **< Import from FileList** is the button to press to import records from the file "**FileList**" to "**Drawing Register.xls**".
3. **Export to FileList >** is the button to press to export records from the file "**Drawing Register.xls**" to "**FileList**".
   Note: Only administrators can export data to the **FileList** if the file **FileList** is located on a networked server.
   Note: Every time you press export, your "**Prefs**" settings will also be exported to the "**FileList**" for safe backup.
4. **Copyright Law UK - Explained** is the hyperlink to press to view the UK law on copyright material, "**Drawing Register.xls**" included.
5. **Download User Guide** is the button to press to download the user guide you are currently reading.
6. **Donate** is the button to press to make a token gesture donation via **PayPal** to the creator of "**Drawing Register.xls**".

Prefs

HELP: Press this button to view a quick setup and user guide and to compare database records between **DR** and FileList, administrators can easily export their managed database list to the FileList where all other network users of **DR** receive their database information from, you need an access code to simplify the process, please request the code from: **alanwelsman@alanwelsman.co.uk**

The bottom section of the help screen will show a link which when pressed, will download this user guide.

This is where you can adjust some of the parameters of **DR**, split into 3 main sections as follows:



Top section - General User Info

Note: Right Mouse Click the question to have it's pre-set answer entered for you or simply Right Mouse Click "**1**" for all presets.

1. **Site Name:** Enter your site location name and email subject title - this name is used on all printed documentation and will be entered into each speedmail as it's subject title.

2. **Header Codes**: Enter 4 path folder and 2 local new file header codes from the range "**A**" to "**T**".

What are header code's ?..... Understanding how header codes work.

When you open or create a new Microsoft Excel file, you will see the worksheets are always setup with column header codes in the form of letters "**A**" to "**IV**" and row numbers starting at "**1**" to "**65000**" or so.

The column headers always start from left to right from "**A**" to "**IV**" - we are only interested in the first 20 columns "**A**" to "**T**".

From the list displayed in **Prefs / Quick Search Display Properties**, you will see a group of letters and numbers.

The letters in black represent the column header codes in the worksheet "**Local**", the numbers in red provide the format of the data within each column and the word in blue is the column header name.

Example: "**A**" means column "**A**", "**1**" means to format the column as text "**#**", "**Group**" means the name at the header of column "**A**"

You can adjust all the column header names simply by changing the details within the "**Prefs**" worksheet, don't try to change the names within the "**Local**" worksheet as the cells are locked.

DR has been setup in such a way you can choose which information from the "**Local**" database to include in relation to files found within the path folders "**Current**" and "**Superseded**".

If you are unsure which codes to use, right mouse click each question to have the default answers automatically entered for you.
The default values will enable a fully functional search system and are as follows.

Note:
Items **2a** to **2d** relate to header codes showing information viewed within the "**Current**" and "**Superseded**" lists.
Items **2e** to **2f** relate to header codes showing information viewed within the "**Local**" list.

2a. **A**: Group - View the documents group's - examples could be electrical, mechanical and architects etc
2b. **D**: Number - View the documents unique reference number's (this is also their file name's)
2c. **E**: Description - View the documents brief description's
2d. **G**: Date - View the documents creation date's
2e. **H**: Comments - When new files are found, the file name including a comment "**Unknown**" will be entered into the Local list.
2f. **K**: Date - When new files are found, the file name including today's date will be entered into the Local list.

Prefs - continued

When you select the **Quick Search**, enter the word "**Unknown**" into the "**Comments**" search field to view all newly found files.
Open each file in turn recording specific details from each document and adding those details into the "**Local**" database.
When newer files are found, don't forget to move the local file to the superseded list by right clicking the old file.

3a. **Path Folders**: Within "**Current**" or "**Superseded**" database lists, amend "**New >**" files or "**Open >**" existing files text.
3b. **Path Folders**: Within "**Current**" or "**Superseded**" database lists, amend "**New >**" files or "**Open >**" existing files text.

4a. **Automatic Updates**: Enter "**Yes**" to automatically update the "**Current**" database when **DR** open's
4b. **Automatic Updates**: Enter "**Yes**" to automatically update the "**Superseded**" database when **DR** open's

5a. **File Extension**: Enter the file extension you wish **DR** to look for, normally "**pdf**" files but can be many others.
5b. **Remove ".tmp"**: Each time Microsoft Excel opens an Excel file, it creates a duplicate data file of itself ending in "**.tmp**", this file is sometimes left sitting on your hard drive when Excel finally closes. You can remove these temporary files automatically by typing "**Yes**" into box **5b**, all "**.tmp**" files will be deleted from the path folder regardless of what program has created them clearing up valuable hard drive space.

6a. **FileList Update**: If **DR** is to be used as stand-alone and you want to create your own "**Local**" database, enter "**No**"

Note: Entering "**Yes**" to option **6a**.
Each time you open **DR**, your personal "**Local**" database will be overwritten, **DR** will open the file "**FileList.xls**" from it's local or networked location and copy it's database contents to your "**Local**" database, this will happen if your own database has a more up to date database.
The only reason for this, is to allow one document controller to manage one single database which is then distributed electronically to all other networked users of **DR**, to stop this update or if you are managing your own database, simply enter "**No**".

6b. **Local or Networked**: If you are intending to manage your own "**Local**" database, enter "**Local**" or leave blank for default "**Local**".
If you are intending to receive your database from a networked location, enter "**Net**" or "**Network**" or "**Networked**".
DR will receive it's information to populate your "**Local**" database from your "**Local**" or "**Network**" folder.

7. Give **DR** permission to export to remote **"FileList"** & delete physical files - If you would like to use **DR** as an administrator and provide other network users an administered database (from any of your networked PC's), you need to enter 2 codes into the spaces provided to perform the automatic functions, simply enter the word "**admin**" into the left box then right mouse click the number "**7**".
Once both codes are entered press the "**HELP**" button, Excel will attempt to read the contents of the file **"FileList"** to compare it's database against your own personal database to let you decide which way to transfer info, make the selection and the data will be copied. You will also be permitted to delete networked files from the remote server drive, you will always be able to delete your own files using Windows Explorer.

Top section - C-Path >, S-Path > & Default

You must tell **DR** where your files are stored, follow the example below to setup the folders.

1. Create a folder called "**Drawings**", inside that folder create another folder called "**Superseded**".
2. Place the file "**Drawing Register.xls**" inside the "**Drawings**" folder you just created then open **DR**, ensure to **enable** macro's.
3. If a message appears "**Missing File FileList.xls**", please allow **DR** to create one for you, select "**Yes**"
4. You must now tell **DR / Prefs / Paths** where to look for your files, several options are available.
4a. If you are using **DR** as a stand-alone version, press the "**C-Path >**" button, a "**Browse for Folder**" path box will appear, search for the folder "**Drawings**" then once found, select it and press "**OK**", once you press "**OK**" the path will be entered for you.
4b. If you right mouse click beneath the answer to "**4a**", the superseded file path will be automatically entered for you.
4c. If you are using **DR** on your own computer and are reading a folder across a network, again press the "**C-Path >**" button, then search across the network to the "**Drawings**" folder, once found, select it and press "**OK**".
4d. Repeat the same procedure as item "**4b**" to enter the superseded path folder.
5. If you enter a folder path and at that location the folders do not exist, **DR** will attempt to create them for you.
6. Default is there to show you where your current version of **DR** has been opened from, use this as your working example.

If you do not enter a path entry, the default entry will be used.

Prefs - continued

Middle section - Quick Search Display Properties

Quick Search Display Properties										
	A 1 Group	B 1 Building	C 1 Lev	D 1 Number	E 1 Description	F 5 Rev	G 3 Date	H 1 Comments	I 1 Scale	J 1 Size
	K 3 Received	L 3 Sent	M 1 Sent To	N 1 Method	O 1 AI	P 1 SI	Q 1 Design	R 1 Drawn	S 1 Checked	T 1 Approved
	Engine	Search1	Search2	Search3	Search4	Search5	Search6	Search7	Search8	Search9
	A	A+ 10	B 10	C 5	D+ 29	E+ 34	F 4	G 8.57	K 8.57	H+ 34.57
	B	A+ 10	B 10	C 5	D+ 29	E+ 34	F 5	I 17	J 17	K 16.59
	C	A+ 10	B 10	C 5	D+ 29	E+ 34	F 5	L 17	M 17	N 16.59
	D	A+ 10	B 10	C 5	D+ 29	E+ 34	F 5	O 17	P 17	Q 16.59
	E	A+ 10	B 10	C 5	D+ 29	E+ 34	F 5	R 17	S 17	T 16.59
	(1) Text		(2) Numbers		(3) Dates		(4) Money		(5) Other	
	#		#.00##		dd-mmm-yy		£#.00##		#0	

This section of "**Prefs**", is to create up to 5 search engines, this is to help you search for groups of data to quickly find files.

Mentioned above was "**Understanding Header Codes**", this section is where you enter those codes (default values entered).

Detailed are 20 groups of text, each group consists of 3 parts, a letter "**A**", a number "**1**" and header text "**Group**".

Letters: You can not alter the letters "**A**" thru "**T**" , these are fixed, these represent the Excel column reference codes.
Numbers: You can set a format to each column via the numbers, **1**: Text, **2**: Numbers, **3**: Dates, **4**: Money, **5**: Other (your choice).
Headers: You can amend the headers for each column, the details entered i.e "**Group**", "**Building**" etc, are only examples.

The following section details how the search engine will be laid out and how wide each column is to be set.

You can create 5 search engines referenced "**A**" thru "**E**", each search engine consists of 9 user input fields "**Search1**" to "**Search9**".
Assigned to each search column is a header code "**A**" thru "**T**" and a number representing a column width "**10**" etc.
By adjusting the number, you can adjust how wide you would like each of the search columns to be within the "**Quick Search**" page.
If you enter the number as "**0**", the column will be hidden from view so you can have a search engine consisting of lesser user inputs.

The next section are the numbers representing the format types, you can assign any of the formats to a column per search engine.

1: Enter the value "**1**" will view all results found in "**Quick Search**" as Text **#** (you can adjust the items in red)
2: Enter the value "**2**" will view all results found in "**Quick Search**" as Numbers **#.00##** (you can adjust the items in red)
3: Enter the value "**3**" will view all results found in "**Quick Search**" as Dates **dd-mmm-yy** (you can adjust the items in red)
4: Enter the value "**4**" will view all results found in "**Quick Search**" as Money **£#.00##** (you can adjust the items in red)
5: Enter the value "**5**" will view all results found in "**Quick Search**" as Other **#0** (you can adjust the items in red)

By adding a plus sign next to each letter i.e "A+" will allow the number of items found per search to be included within the column header.

Bottom section - Page Zoom - Auto or %

Page Zoom Auto or %	Prefs	Current	Superseded	Local	Quick Search
	Yes	Yes	Yes	96	Yes

DR is made up of 5 worksheets, "**Prefs**", "**Current**", "**Superseded**", "**Local**" and "**Quick Search**".

Because **DR** can be used across many computer systems using different monitor configurations, the screen resolution may not always be the same on 2 different PC's, so Excel has an inbuilt feature where it can automatically adjust the active area to your screen regardless of it's resolution.

The clever part to this feature is when the computer hosting **DR** is being remote controlled, the screen still automatically sizes to the available screen size of the client in use i.e laptops, tablets, mobile phone etc.

Beneath each of the 5 worksheet names are 2 boxes, into the left box you can enter the word "**Yes**" for automatic page zoom or leave blank then enter the numeric page zoom % into the right hand box, is a numeric value is not entered, a 100% default value will be used.

Enter this information for all 5 worksheets.

Current

This is a database of files found within the **C-Path** folder "**Drawings**", this should be files currently in use and the latest revisions.

You can not enter any details into this list, it's function is to quickly list all files currently inside the "**Drawings**" folder.

When you select the blue-tab "**Current**", there may be nothing listed, this may be because you have chosen not to automatically update the "**Current**" database on file open, to set to auto update, navigate to "**Prefs**" and change question "**4a**" to "**Yes**".

To manually update the database, press the "**< Update**" button located (top right), if you press it twice, you can see which files are new.

You can choose which details from the "**Local**" database to include within this list simply by adjusting the properties in " **Prefs**, **2a-2d**".

DR will compare your current document filenames and highlight as red text if it finds any files which it believes may not need to be in this folder, are they superseded document's?, if so right mouse click the known superseded files to be asked if you would like the document moved into the superseded folder, select "**Yes**" for the move to be carried out for you. * *this feature only happens in the Current folder* *

Note 1: To sort the database, simply press the "**Up**" arrow key after pressing "**< Update**" on the column of choice.
Note 2: Pressing the very top address bar will take you to the current "**C-Path**" folder as written.
Note 3: New files are highlighted as "**New >**", and are only found when pressing the "**< Update**" button.
New files which are not currently listed within in the "**Local**" database are entered into the "**Local**" database for you.
When you then select the "**Local**" database, you will be taken to the list of the new files, simply add information against each new file.

Superseded

This is a database of files found within the **S-Path** folder "**Superseded**", this should be the out-dated files and not in use.

You can not enter any details into this list, it's function is to quickly list what files are inside the "**Superseded**" folder.

When you select the red-tab "**Superseded**", there may be nothing listed, this may be because you have chosen not to automatically update the "**Superseded**" database on file open, to set to auto update, navigate to "**Prefs**" and change question "**4b**" to "**Yes**".

To manually update the database, press the "**< Update**" button located (top right), if you press it twice, you can see which files are new.

You can choose which details from the "**Local**" database to include within this list simply by adjusting the properties in "**Prefs**, **2a-2d**".

If you see files listed and one of them is a current document, right mouse click it, you will be asked if you would like the document moved into the current folder for you.

Note 1: To sort the database, simply press the "**Up**" arrow key after pressing "**< Update**" on the column of choice.
Note 2: Pressing the very top address bar will take you to the superseded "**S-Path**" folder as written.

Local

This is your managed database, the heart of **DR** and if networked, the database everybody else will use.

It's function is to allow you to electronically tag every document you have within the current folder "**Drawings**".
You only need to tag the new documents and leave the older document information intact, as this information is still searched upon.

So to recap, each time you or a colleague transfers new drawings or documents into the "**Drawings**" folder, then press twice the "**<Update**" button whilst within the "**Current**" database, any new drawing or document found will have their file names automatically added into the "**Local**" database, so when the "**Local**" database is selected, you will be guided to the new file list so you can start to add more information about it.

During the filename entry, 2 other pieces of information will be entered, one is under comments called "**Unknown**" and the other under received which will be the date when the file was added.

Use **Quick Search** to search for the word "**Unknown**" under the search header comments to see the newly added files.
Open each file in turn and add to the database the information about each drawing or document.

The header names within the "**Local**" database are adjusted in the "**Prefs**" page, the two entries above are changed via "**Prefs**, **2a-2d**".

By pressing the header name will sort the list in an ascending or descending order.

Quick Search

This is where you can quickly find and open drawings or documents matching any wildcard search from one or all of the 9 search inputs.
Starting on the left side, is a letter "**A**" and a number "**1**".

A	Group	Building	Lev	Number	Description	Rev	Date	Comments
1			3					
1	Mech	Jubilee	3rd	59M001	Ward Block Roof Plant Bases	v1	04-Dec-12	First Issue
2	Doors	Jubilee	3rd	Z232A013-C1	Third Floor & Roof Plan Door References	C1	08-Feb-13	See sheet info
3	Elec 2/8	Jubilee	3rd	WSP-0142-GA-620-03-101-AF	Small Power / Data / Telephone / CCTV	AF	27-Jan-14	As fitted
4	Elec 2/8	Jubilee	3rd	WSP-0142-GA-620-03-101-C1	Small Power / Data / Telephone / CCTV	C1	30-Nov-10	Issued for Construction Stage
5	*Elec 2/8*	*Jubilee*	*3rd*	*WSP-0142-GA-620-03-101-T1*	*Small Power / Data / Telephone / CCTV*	*T1*	*17-Mar-10*	*Tender Issue*
6	Architect	Jubilee	3rd	Z223A009-C2	Slab Penetrations Sht. 2 of 2	C2	24-Aug-12	No detail
7	Architect	Jubilee	3rd	Z223A008-C3	Slab Penetrations Sht. 1 of 2	C3	28-Aug-12	No detail
8	Elec 5/8	Jubilee	3rd	WSP-0142-GA-680-03-101-AF	Security / TV Sockets	AF	27-Jan-14	As fitted
9	Elec 5/8	Jubilee	3rd	WSP-0142-GA-680-03-101-C1	Security / TV Sockets	C1	30-Nov-10	Issued for Construction Stage
10	*Elec 5/8*	*Jubilee*	*3rd*	*WSP-0142-GA-680-03-101-T1*	*Security / TV Sockets*	*T1*	*17-Mar-10*	*Tender Issue*
11	Architect	Jubilee	3rd	Z002A013-C1	Room names and numbers - Sheet 2 of 2	C1	31-Jul-13	For information only
12	Architect	Jubilee	3rd	Z002A012-C1	Room names and numbers - Sheet 1 of 2	C1	31-Jul-13	For information only
13	Architect	Jubilee	3rd	Z002A014-C1	Room names and numbers - Roof Plan	C1	31-Jul-13	For information only
14	Mech	Jubilee	3rd	WSP-0142-GA-500-03-102-C1	Roof - Room Services Layout	C1	30-Nov-10	Issued for Construction Stage
15	Mech	Jubilee	3rd	WSP-0142-GA-500-03-102-C2	Roof - Room Services Layout	C2	05-Oct-12	Dry Riser details added
16	Mech	Jubilee	3rd	WSP-0142-GA-500-03-102-C3	Roof - Room Services Layout	C3	11-Jan-13	HUB Room DX Units relocated from Plantroom
17	*Mech*	*Jubilee*	*3rd*	*WSP-0142-GA-500-03-102-T1*	*Roof - Room Services Layout*	*T1*	*17-Mar-10*	*Tender Issue*
18	Schematic	Jubilee	3rd	WSP-0142-SC-500-XX-901-AF	Plantroom Schematic	AF	26-Mar-14	Drawing updated by Alan Welsman
19	Schematic	Jubilee	3rd	WSP-0142-SC-500-XX-901-C1	Plantroom Schematic	C1	30-Nov-10	Issued for Construction Stage
20	Schematic	Jubilee	3rd	WSP-0142-SC-500-XX-901-C2	Plantroom Schematic	C2	27-Nov-12	BDP Comments
21	*Schematic*	*Jubilee*	*3rd*	*WSP-0142-SC-500-XX-901-P1*	*Plantroom Schematic*	*P1*	*04-Jan-10*	*Preliminary Issue*
22	Mech	Jubilee	3rd	WSP-0142-GA-500-03-103-C1	Plantroom Plant Layout Piped & Ductwork	C1	30-Nov-10	Issued for Construction Stage
23	Mech	Jubilee	3rd	WSP-0142-GA-500-03-103-C2	Plantroom Plant Layout Piped & Ductwork	C2	05-Oct-12	Ground floor Hub & Regen kitchen cooling relocated
24	Mech	Jubilee	3rd	WSP-0142-GA-500-03-103-C3	Plantroom Plant Layout Piped & Ductwork	C3	26-Nov-12	Sizes added to pipes as clouded
25	Mech	Jubilee	3rd	WSP-0142-GA-500-03-103-C4	Plantroom Plant Layout Piped & Ductwork	C4	29-Nov-12	Ductwork & Pipework amended, Bases added
26	Mech	Jubilee	3rd	WSP-0142-GA-500-03-103-C5	Plantroom Plant Layout Piped & Ductwork	C5	07-Jan-13	AHU 03 & 04 Valve sets relocated
27	Mech	Jubilee	3rd	WSP-0142-GA-500-03-103-C6	Plantroom Plant Layout Piped & Ductwork	C6	30-Jan-13	SF07 & EF08 Ref Added and Attenuator size
28	*Mech*	*Jubilee*	*3rd*	*WSP-0142-GA-500-03-103-T1*	*Plantroom Plant Layout Piped & Ductwork*	*T1*	*17-Mar-10*	*Tender Issue*
29	Mech	Jubilee	3rd	WSP-0142-GA-500-03-101-C1	Plantroom Plant Layout Main Plant	C1	30-Nov-10	Issued for Construction Stage
30	*Mech*	*Jubilee*	*3rd*	*WSP-0142-GA-500-03-101-T1*	*Plantroom Plant Layout Main Plant*	*T1*	*17-Mar-10*	*Tender Issue*

Blue: Current, Red: Superseded, Grey: Files not available, if Excel non responsive, start [Task Manager] then [Switch To] pdf application.

The letter "**A**" denotes which "**Search Engine**" is currently in use, you have **5** engines to choose between and are "**A**" thru "**E**".
To change to a different search engine, simply type or double click the letter "**A**", it will change to "**B**" then "**C**" and so on back to "**A**".
Each time the letter changes, the column headers and width's will also change as to what is pre-configured in "**Prefs**".

The number "**1**" denotes the starting number to list from during a successful search and can view up to 30 records at once.
If more than 30 records are found, simply enter a new list from number i.e. "**31**" (top left) to continue viewing additional records.
If you notice a record error or need to modify the results being viewed, simply right mouse click that result to be taken to that record.
Once the record has been modified, right mouse click anywhere on screen to jump back to the Quick Search page.

You will see there is a header bar, beneath each header title is an empty space to write a single word or a wildcard i.e. instead of writing the full word **distribution** you simply write the letters **dis** and all entries with the letters **dis** inside them will be listed, entering **?** into any search box will list all its results, entering **??** into the **Group** search box will list the different types of groups.

Whilst searching, the left list from column may highlight red, this means there is a record duplication within the "**Local**" database.
Whilst searching, the search header's may highlight red, this means there are too many matches, make your search word longer to narrow.
You can arrange the search engines to display records in any way you wish, this is done in the "**Prefs**" page.
You can enter search strings in any random combination to help find your records.

You can select/unselect individual files from your results by selecting it's red row number, selections made will be highlighted in yellow.
To carry out special functions, simply right mouse click any of the search boxes, this will bring up the "**Quick Search Options**" box.
Select one of the options to carry out it's task for the individually highlighted results or if none selected, all results visible.

The bottom of the "**Quick Search**" details what types of files have been found, there are 3 types.
Blue results are records within the "**Drawings**" folder and are the files currently in use.
Red results are records within the "**Superseded**" folder and are the files not currently in use, they are now superseded files.
Grey results are records of files listed only in the "**Local**" database, the file's don't physically exist within either path folder.

If you click the very bottom notices bar, only the records where documents are physically available to open are displayed.
If you have gaps of white space within your search results, press the very bottom notices bar to reset "**Quick Search**" viewing settings.
Press the bar again to view all records, If Excel becomes non-responsive, it's probably because you have clicked on a document to open and have an issue to what version of file application to use, the request or answer box is sometimes hidden behind Excel, if this happens Excel will appear to freeze or hang, please don't reset your PC as nothing is wrong, simply start the "**Task Manager**" then "**Switch To**" the application of the document program, press the desired action then Excel will resume as normal.

Quick Search - Keyboard Shortcut's & Mouse Shortcut's

Keyboard Shortcut's

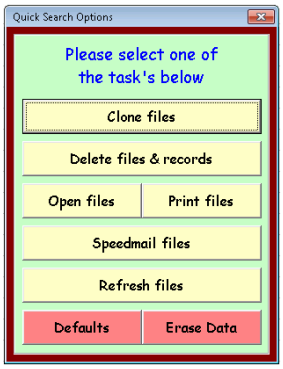
1. **CTRL+Shift+C**: Clone all or 1 single file from the remote PC to your PC as displayed on line 1 in "**Quick Search**" results.
2. **CTRL+Shift+D**: Delete all the files including your "**Local**" database records as currently displayed in "**Quick Search**" results.
3. **CTRL+Shift+O**: Open all the files as currently displayed in "**Quick Search**" results.

Mouse Shortcut's

4. **Right Mouse Click**: To see a list of options you can perform using "**Quick Search**", right click within the white space shown below if the form is displaying search results or right mouse click anywhere onscreen where results are not shown.

	Group	Building	Lev	Number	Description	Rev	Date	Comments
A								
1								

You will be presented with a "**Quick Search Options**" dialogue box with 8 options you can choose from.



1. **Clone** — Clone all or 1 single file detailed on line 1 from a remote location to your PC.
2. **Delete** — Delete the files matching all the results shown on the Quick Search page.
3. **Open** — Open to view the files matching all the results shown on the Quick Search page.
4. **Print** — Print without viewing the files matching all the results shown on the Quick Search page.
5. **Speedmail** — Email the files matching all the results as shown on the Quick Search page.
6. **Refresh** — Refresh the file list, select if you have recently pressed "Save" or "Save As".
7. **Defaults** — Return Drawing Register to it's original defaults state.
8. **Erase Data** — Erase all your data contained within Drawing Register to it's original state.

Speedmail

When you create an email using **DR**, attached to the email will be a unique Microsoft Excel file called "**Speedmail.xls**".
Speedmail.xls will include from your personal database, information from all the attached document's within your new email.
When your colleague receives your email, they may save all the attached document's including **Speedmail.xls** to their drawings folder.
Your colleagues can update their own **DR** databases simply by selecting the worksheet "**Local**" and allowing **DR** to auto import & update.
DR will continually check for new **Speedmail.xls** updates and if it finds one, will ask your permission if it's OK to import it's data.
Ensure your colleague has his/her **DR** database setup the same as your own as information will be copied as laid out in yours.

By choosing [**Yes**], the Speedmail.xls file will be opened, it's data imported, closed, then will be permanently deleted automatically.
By choosing [**No**] will leave Speedmail.xls alone until you either manually move or delete it from the Drawings folder.

Which files can I email

If only current (**blue**) results are shown during your search, these files will be attached automatically to your email without menu.
If both current and superseded (**red**) files are shown during your search, you will be presented with the following 3 questioned menu.

Q1. Would you like to email all visible onscreen document's?
Y: Proceed to **Q2**.
N: Exit the speedmail menu.

Q2. Attach superseded document's too?
Y: Both current and superseded files are attached to an email for you.
N: Proceed to **Q3**.

Q3. Attach only superseded document's?
Y: Only superseded files are attached to an email for you.
N: Only current files are attached to an email for you.

Macro's - Automated Routines

1. **FileClone**: Use whilst in "**Quick Search**", Press **CTRL+Shift+C** to Clone / duplicate files as listed on line 1.
2. **FileDelete**: Use whilst in "**Quick Search**", Press **CTRL+Shift+D** to Delete both physical files and "**Local**" database records as listed.
3. **FileOpen**: Use whilst in "**Quick Search**", Press **CTRL+Shift+O** to Open and view multiple files as listed.
4. **FilePrint**: Use whilst in "**Quick Search**", Press **CTRL+Shift+P** to Open, print & close multiple files as listed.
5. **MasterReset**: Run this macro to reset Drawing Register to it's original state when originally downloaded from www.alanwelsman.co.uk

Flow Chart

The following flow chart shows how **DR** works and it's sequence of carrying out it's tasks.

Drawing Register.xls
File Open
Enable Macro's Y/N
No
Automatic Functions Disabled
Yes
Automatic Functions Enabled
Does "FileList.xls" Exist?
No
Create "FileList.xls" Y/N
(Local Backup Database)
Yes
If "Prefs Q6a" is "No"
FileList data will not copied
Setup "Prefs" Q1-Q7
(Right Click Q1 for defaults)
Help
Press "HELP" for more information
Provides a quick setup guide
If "Prefs Q6b" is "Net" or "Network"
Copy FileList from Network location
Setup "Current" Path
(Right Click space for defaults)
Folder ?
Press the "Path >" button
Navigate to any desired folder
If "Prefs Q6b" is "Local" or blank
Copy FileList from local machine
Select "Current"
Press the "< Update" button
Sort & Print
Sort each column by arrowing
up at the top of each column
File Check
Press the "< Update" twice
New files added to "Local" list
Setup "Superseded" Path
(Right Click space for defaults)
Folder ?
Press the "SS Path >" button
Navigate to any desired folder
Right Click "File Name" to move files
between "Current" & "Superseded"
Select "Superseded"
Press the "< Update" button
Sort & Print
Sort each column by arrowing
up at the top of each column
File Check
Press the "< Update" twice
New files added to "Local" list
Select "Local"
New files added, please tag
Auto Fill
If "Local" is empty, a new
database will be copied into it
< New Files
Select "Quick Search"
Sort by pressing column headers
Use upto 9 *wildcard* search strings
Press "A" to rotate engine thru to "E"
Amend "1" to list more results
Click any row No. to open drawings
View current & superseded files
Hide missing files from search view
Right Click
"Quick Search Options"
Choose one of the 5 options
Press "Ctrl+Shift+C" or click
Clone remote files to local machine
Press "Ctrl+Shift+D" or click
Delete all path file's & "Local" records
Press "Ctrl+Shift+O" / "P" or click
Open or Print all visible path file's
Press to "Speedmail" viewed records
Email options all visible path file's
Press to "Refresh" viewed records
Will update path file lists
Press to "Master Reset"
Return to original settings
If "Prefs Q6b" is "Local"
Local database will be copied
If "Prefs Q6b" is "Net" or "Network"
Network database will be copied
If "Prefs Q6b" is "Net" or "Network"
Administrator Privileges
Admin
If "Prefs Q7" is entered
Administrator Privileges
Press "Save As"
Drawing Register - Backup.xls
Press "Close"
Drawing Register - Auto Save

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